



This job aid provides step-by-step instructions for using FPMT's lease renewal wizard to renew a lease contract. If you are renewing a lease with an associated receivable lease, refer to the [Master Lease and Receivable Lease Renewal](#) job aid.

As of April 2024, FPMT's accounting functionality and integration with the Agency Financial Reporting System (AFRS) have been removed. There is now only one agency editor role, which has access to all wizards.

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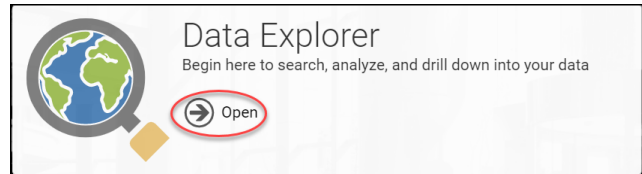
**Overview**


<b>Where do I access the renewal wizard?</b>	<ul style="list-style-type: none"> <li>The renewal wizard is accessed via the menu button on the expiring lease contract tile.</li> </ul>
<b>When should I renew a lease?</b>	<ul style="list-style-type: none"> <li>Leases should be renewed no later than 30 days after the new lease start date.</li> </ul>
<b>What information do I need to renew a lease?</b>	<ul style="list-style-type: none"> <li>A copy of the new lease contract.</li> <li>The expiring lease contract number.               <ul style="list-style-type: none"> <li>If you need to locate a lease number, you can run a Lease Contract Inventory Report from the agency tile in FPMT.</li> </ul> </li> <li>If this is a renewal of office space that is in scope for the Six-Year Facilities Plan, populate the tenant improvement one-time cost fields in the lease contract table, if applicable. If actuals are not available, use an estimate and update the system when you have actuals.</li> </ul>
<b>What is the difference between a lease renewal and a lease extension?</b>	<ul style="list-style-type: none"> <li>A lease renewal involves a new lease number.</li> <li>A lease extension is an <a href="#">amendment</a> to an existing contract.</li> </ul>
<b>Why should I use the wizard?</b>	<ul style="list-style-type: none"> <li>Users can no longer manually edit data in FPMT and must use the wizards to renew lease contracts.</li> <li>The wizard simplifies the renewal process by guiding you through each step and reducing manual activity in the system.</li> <li>The wizard also includes business rules, or validation checks, to prevent incomplete data and common data entry errors.</li> </ul>
<p><b>Wizard basics:</b></p> <ul style="list-style-type: none"> <li>The wizard opens in a new window, which will close when you complete the renewal. Once the renewal window closes, you will need to refresh your original FPMT window to see all of the changes.</li> <li>Once you Save and Close the renewal, you cannot go back into the wizard.</li> <li>Make sure to allow enough time to complete the renewal process in one sitting. If you time out during the renewal process, <u>you will lose your data</u>.</li> <li>You navigate through the wizard by clicking the Next or Previous buttons.</li> </ul>	

**Launch the Lease Renewal Wizard**

Navigate to the expiring lease contract and launch the lease renewal wizard.

**1. Open** the Data Explorer module.



**2. Select** the  **Search** button on the data explorer tool bar.

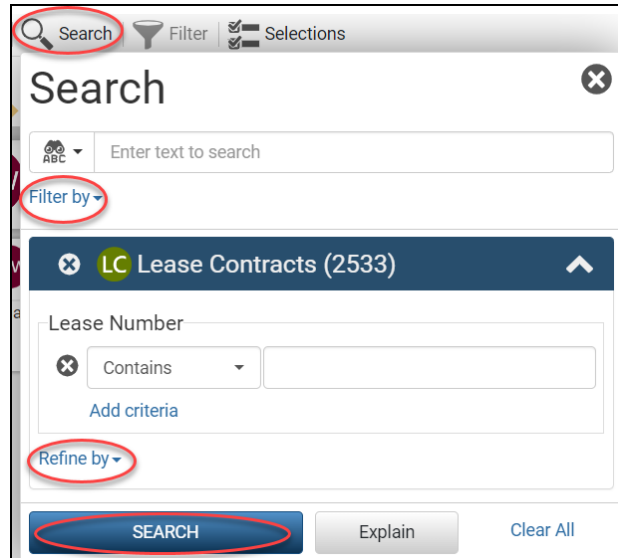
**3. Select** **Filter by** and choose **Lease Contracts**.


**4. Select** **Refine by** and choose **Lease Number**.

**5. Enter** the lease number for the expiring lease contract.

→ If you need to locate the expiring lease contract number, run the Lease Contract Inventory Report available via the menu button on the agency tile.

**6. Select** 

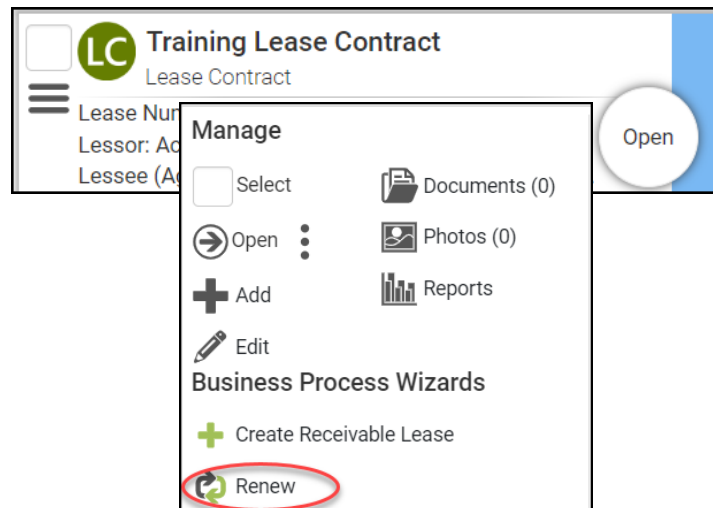


**7. Select** the  menu button on the lease contract tile

**8. Select**  **Renew**

→ FPMT will open the lease renewal wizard in a new window.

→ The system will automatically populate information from the existing lease. You may update this information if there are changes.



### Renew the Lease Contract

1. **Enter agency data.** Red fields are required.
  - Name
    - ➔ Use the lease number
  - Lease Number
    - ➔ Lease numbers must be unique; they cannot be used for more than one record.
  - Is this a triple net lease?
    - ➔ Defaulted to No. Update if applicable.
  - Lease Executed Date
    - ➔ The date the last party signed.
  - Lease Start Date
  - Lease End Date

**Lease Contract**

Name | Required

Description

Lease Number | Required

Is This A Triple Net Lease? ?

No ▼

Triple net lease, triple net, or NNN, is a type of commercial real estate lease where the tenant or lessee pays the full expenses of the property.

Lease Executed Date ? 📅

| Required

Lease Start Date 📅

| Required

Lease End Date 📅

| Required

➔ The following fields only apply to office spaces that are in scope for the Six-Year Facilities Plan. If your facility is out of scope, select No.

➔ If any of these fields are relevant to your location and you do not have actuals, enter an estimate. Do not leave the cost fields blank. When actuals are available, update the record.

➔ If you select Yes for the red (system-required) fields, additional fields become required.

- Was furniture moved to this location?
- Moving furniture cost, if applicable
- New furniture cost, if applicable
- If new furniture was purchased, why wasn't existing furniture used?
- Were staff moved to this location?
- Staff moving cost, if applicable
- Are there tenant improvement (TI) costs?

Was Furniture Moved To This Location? | Required ▼

Moving Furniture Cost, If Applicable

New Furniture Cost, If Applicable

If New Furniture Was Purchased, Why Wasn't Existing Furniture Used?

Were Staff Moved To This Location? | Required ▼

Staff Moving Cost, If Applicable

Are There Tenant Improvement (TI) Costs? | Required ▼

If any cost fields are populated, the associated fields become required.

- Construction – Cost
- Construction – How are tenant improvements being paid for?
- Common Area Improvement - Cost
- Common Area Improvement – How are tenant improvements being paid for?
- Exterior Improvement – Cost
- Exterior Improvement – How are tenant improvements being paid for?
- Fire and Security Improvement – Cost
- Fire and Security Improvement – How are tenant improvements being paid for?
- Deferred Maintenance – Cost
- Deferred Maintenance – How are tenant improvements being paid for?
- Other Tenant Improvement
- Other – Cost
- Other – How are tenant improvements being paid for?
- If tenant improvement costs are not one-time costs, how much is added to the cost/SF?

Construction - Cost

Construction - How Are Tenant Improvements Being Paid For?

Common Area Improvement - Cost [?](#)

Common Area Improvement - How Are Tenant Improvements Being Paid For? [?](#)

Exterior Improvement - Cost [?](#)

Exterior Improvement - How Are Tenant Improvements Being Paid For? [?](#)

Fire And Security Improvement - Cost

Fire And Security Improvement - How Are Tenant Improvements Being Paid For?

Deferred Maintenance - Cost

Deferred Maintenance - How Are Tenant Improvements Being Paid For?

Other Tenant Improvement

Other - Cost

Other - How Are Tenant Improvements Being Paid For?

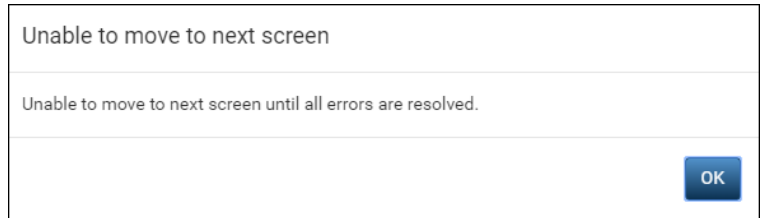
If Tenant Improvement Costs Are Not One-Time Costs, How Much Is Added To The Cost/Sf?

**2.** Once you have completed the lease contract table, **select**

→ If you navigate away from the lease contract form before properly completing the table, you will receive an error message.

→ You cannot move forward until the error is fixed.

**Note:** This error will show up in every table if you try to save with missing/incorrect data or try to navigate away before properly completing the table. In addition to this error, you will see a message in pink with more detail.



Unable to move to next screen

Unable to move to next screen until all errors are resolved.

OK

**Errors**

- One or more provided values are invalid.

→ In addition to validating that all required fields have been populated, the wizard will also ensure that the lease contract start date is a date prior to the lease contract end date.

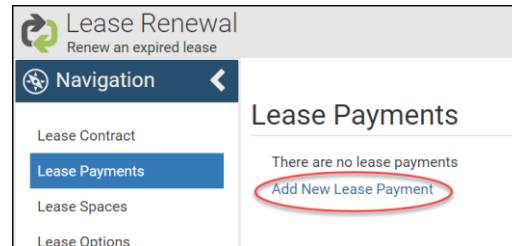
**Errors**

- The lease contract start date must be prior to the lease contract end date.

**Add a Lease Payment**

**1. Select Add New Lease Payment**

→ You cannot save and close the renewal until you add at least one lease payment. If there is no base rent for the facility, enter a lease payment for \$0.



Lease Renewal  
Renew an expired lease

Navigation

- Lease Contract
- Lease Payments**
- Lease Spaces
- Lease Options

Lease Payments

There are no lease payments

**Add New Lease Payment**

**2. Enter agency data. Red fields are required.**

- Name
  - Use payment type – payment series number (e.g., Base Rent - 1).
- Payment Series Number
  - Use sequential numbers for payment series (1, 2, 3, etc.).
- Payment Frequency (dropdown)



**Edit Lease Payment Details**

Name  
Required

Description

Payment Series Number  
Required

Payment Frequency  
Required

- Payment Type (dropdown)
- Payment Amount  
Required
- Index Rate  
→ Index or rate used to determine payment amounts. Required if payment type is Indexed Payment.




Payment Type  
Required


Payment Amount  
Required

Index Rate ?

- Payment Start Date
- Payment End Date

Payment Start Date  

Required

Payment End Date  

Required

**3. Select SAVE CHANGES**

SAVE CHANGES

Cancel Changes

→The lease payment table features the following validation checks:

- All required fields must be completed.
- Index Rate is required if Payment Type is “Indexed Payment.”
- The lease payment start and end dates must fall within the parameters of the lease contract start and end dates.

→The lease payment table cannot be saved until errors are corrected.

→If you navigate away from the lease payment table before saving, you will receive an error.

→Once the lease payment is saved, you can update the information by selecting the details icon or delete the payment by selecting the trash can.

→Repeat this process if there is more than one lease payment series. All payments can have an Active status.

→You must enter all lease payment series for the contract, even if the lease is being entered into FPMT retroactively.

→Once you are done adding payments, select Next > to add a Space.

**Errors**

- The lease payment index rate is required when the payment type is indexed payment.

**Errors**

- The lease payment start date must be on or after the lease contract start date of 11/1/2019.
- The lease payment end date must be on or before the lease contract end date of 10/31/2021.

**Errors**

- One lease payment is required.

**Lease Payments**

Payment Name	Payment Series Number	Details	Delete
Base Rent-1	1		

[Add New Lease Payment](#)


← Previous

Next >

Cancel All Changes

### Add a Space

The renewal wizard was recently updated and now requires users to create a new space when renewing a lease.

1. **Select** Add New Space
2. **Enter** agency data. Red fields are required.
  - Select the information  icon for additional guidance about fields.
    - Name
      - Use the Space ID

- Space ID
  - UFI-Lease Number-Space Number (e.g., A27122-SRL 24-0001-1)
  - Use sequential space numbers if there is more than one space (e.g., 1, 2, 3)
- Square Feet
  - The sum of all space square feet cannot exceed the total square feet in the lease contract.
- Square Feet Measurement Type (dropdown)
- Primary Space Type (dropdown)
- → Refer to the [Property Class & Space Type Categories](#) job aid for additional information.
- Secondary Space Type
- Additional Space Type

- If part of your new space is available for use by another agency, refer to the [Available Space](#) job aid for details on how to populate the additional fields for potential collocation.
  - If Available Space is marked Yes, you must populate the **Annual Full Service Rate per Square Foot** and **Available Occupancy Date** fields.

### Lease Contract Spaces

No lease contract spaces found

[Add New Space](#)


### Edit Space Details

Name


**Required**

Description


Unique Facility ID  
A01316


Space ID 

**Required**

Tenant 

Office of Financial Management - 105


Other Tenant 

Square Feet 


**Required**


Square Feet Measurement Type

**Required**

Primary Space Type 

**Required**

Secondary Space Type 


Additional Space Type 

Available Space 



→ If this leased facility is in scope for the [Six-Year Facilities Plan](#), you must populate the following additional fields:

- Number of Offices
- Number of Cubicles
- Number of Touchdown Spaces
  - Refer to any unassigned workspace (office, cube, bench etc.) that could be used for hoteling as a touchdown space.

→ Select the information  icon for definitions.

→ OFM will populate user count fields from HRMS data via import.


Number of Offices (Required For Six-Year Plan) 

Number of Cubicles (Required For Six-Year Plan) 

Number of Touchdown Spaces (Required For Six-Year Plan) 

Number of Resident Users (Required For Six-Year Plan) 

Number of Externally Mobile Users (Required For Six-Year Plan) 

Number Of Fully Remote Users (Required For Six-Year Plan) 

→ If you're updating the square footage, make sure the total space square feet matches the square feet in the lease contract table.

→ You will receive an error message when you click Next if the space square feet exceeds the lease contract square feet.

**Errors**

- The square footage of all spaces associated with a lease contract cannot exceed the lease contract square feet. The lease contract square feet is currently 19,440 and the total associated space square feet is 19,447.

**3. Select SAVE CHANGES**

SAVE CHANGES

Cancel Changes

→ If you need to add a Lease Option, select Next >

→ If you **do not** need to add a lease option, select Next > four times to skip ahead to [Data Review](#).

< Previous

Next >

Cancel All Changes

**Add a Lease Option**

**1. Select Add New Lease Option**

## Lease Options

---

There are no lease options

Add New Lease Option

**2. Enter agency data. Red fields are required.**

- Name  
→ Use the option type – option number (e.g., Cancel – 1).
- Option Number  
→ Options should be numbered in the order they appear in the lease contract (1, 2, 3 etc.).
- Option Type (dropdown)
- Option Description  
→ Provide a brief description of the clause in the lease.
- Option Date

**Edit Lease Option Details**

Name  Required

Description

Option Number  Required

Option Type  Required

Option Description  Required

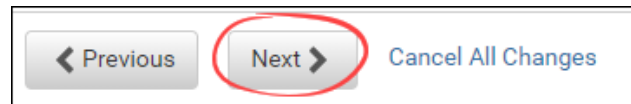
Option Date  Required

**3. Select SAVE CHANGES**






→ Select **Next >** three times to review your data.

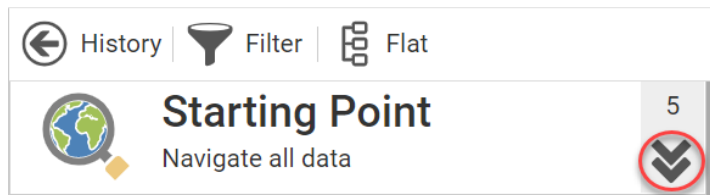
→ If you need to enter a lease amendment, refer to the [amendments](#) job aid for details on required table updates by amendment type.



**Data Review**

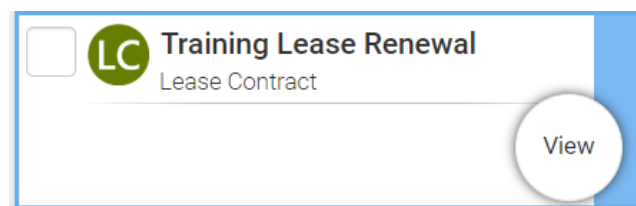
**1. Select the**  **Hierarchy** button to change to the  **Flat** view. You can now see all the tables you have added or edited as part of the renewal process.

**2. Select the arrows**  **on the Starting Point tile to expand all of the tiles below.**



**3. Select View** on each tile to see the data you have entered for the renewal.

**4. Review** the data for your lease renewal.



→ To edit your data, use the Previous button to navigate back to an earlier screen.

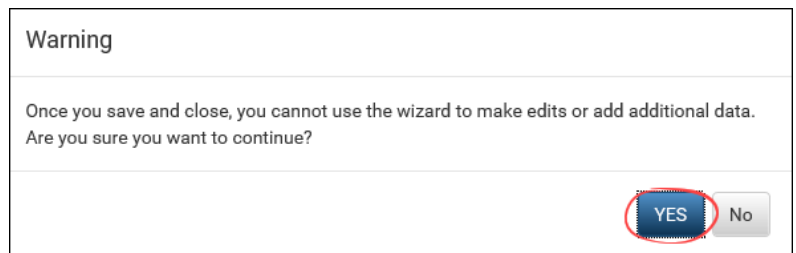


**5. Select** SAVE AND CLOSE to complete your renewal.

**6.** You will see a warning that lets you know you can't go back into the wizard after saving and closing. If you don't need to make any additional edits, select YES.



→ When you complete the renewal, the window will automatically close. FPMT will still be open in the original window. You will need to refresh your screen in order to see your changes.



→ Continue to the next step below to upload a copy of the new contract.

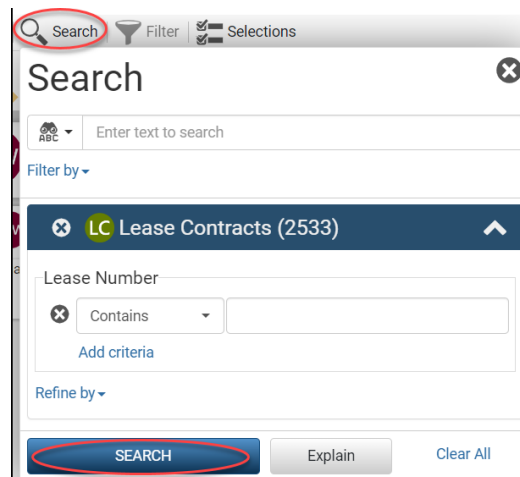
### Upload Copy of New Contract

**1. Select** the Search button on the data explorer tool bar.

→ Your filters will remain in place from your original search.

**2. Remove** the old lease number and enter the new one.

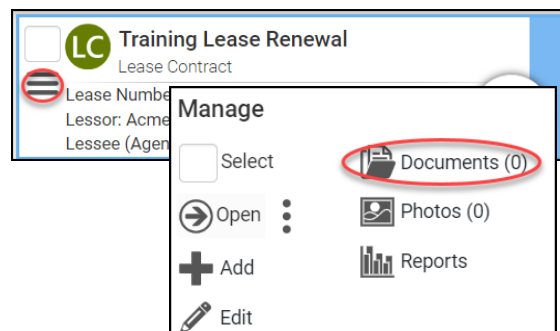
**3. Select** 



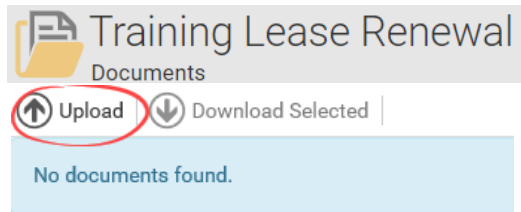
**4. Select** the menu button on the new lease contract tile.

**5. Select** Documents

→ The document manager will open in a new window.



**6. Select the  Upload button.**



**7. Browse for, or drag and drop, the file.**

**8. Select CLOSE.**

